PennERA PROPOSALS DATA COLLECTION
Quick Reference Guide

WHO SHOULD USE THIS DATA COLLECTION?

Anyone who wants to use PennERA Proposals data for actions such as:

- Monitoring sponsored project proposals in the pre-award stage and/or the post-award stage
- Managing advance accounts (departmental funding in anticipation of awards)
- Developing sponsored project funding projections in support of the budget process
- Analyzing trends in sponsored project funding
- Reconciling PennERA data and General Ledger data for sponsored project funds (5- funds)
- Reporting on current and historic information about sponsored projects (e.g., grants and contracts)

WHAT TYPES OF BUSINESS QUESTIONS CAN I ANSWER USING THE PennERA PROPOSALS DATA COLLECTION?

There are a great many business questions that can be addressed using the PennERA data collection, from the simple to the complex. For example:

- Which proposals submitted over a year ago are still pending a decision from the sponsor?
- To what accounts can costs for this project be charged?
- Which of my awarded projects involve cost sharing?
- How much money do we expect to receive in the out years for my project?
- How has NIH funding for my ORG changed over the past five years?
- How much of the money in this fund comes from carryover?

COLLECTION DESCRIPTION

The **PennERA Proposals Data Collection** is a subset of the University's Data Warehouse, containing data from the Proposal Tracking module of PennERA. PennERA is the University's Electronic Research Administration system, supporting pre- and post-award administration of sponsored projects for Penn's academic research community. The **PennERA Proposals Data Collection** contains current and historic information about sponsored projects (such as grants and contracts) at Penn.

- **Current PennERA Proposals data is refreshed nightly** in the Data Warehouse, **Monday through Friday**, following the completion of the job that feeds BEN Financials data to PennERA.
- **Annual snapshots of the PennERA Proposals data** are taken every winter, to support longitudinal studies.
- **Data sources:**
  - **Current data** comes from the Proposal Tracking module of PennERA, the University's electronic research administration system (in use since October 14, 2003).
  - **Annual snapshot data** comes from the tables in the Data Warehouse that store current data for the PennERA Proposals and General Ledger data collections.
- **Data tables/elements:** Documentation for a *Table* includes the explanation, common uses, primary key, indexed data elements, and related tables for the table. Documentation for a table's *Elements* specifies the definition, list of values, format, and the possibility of null values for each data element in the table. Documentation for PennERA Proposals data is available at https://www.isc.upenn.edu/pennera-proposals-data-collection#Tables-and-Data-Elements.

DATA INCLUDED IN THE PennERA PROPOSALS DATA COLLECTION

- **PennERA Proposals Universe –** enables access to **current information** about sponsored project proposals from the time when they are under review (routed for internal approval) onward. Provides

figures for direct costs, indirect costs, and cost sharing at the proposal, budget period, request, and funded increment levels. Includes information on sponsors and investigators; status history for proposals, requests, and funding increments; and the administrative activities, regulatory approvals, and international locations pertaining to each proposal. For further information, see
http://provider.www.upenn.edu/computing/da/dw/research/proposals/penneraproposals.html

- **PennERA Proposals Snapshots Universe -** supports longitudinal studies, because it provides access to the static data stored in the **annual snapshots** of the **PennERA Proposals Data Collection**. Also includes Balances (in the **General Ledger Data Collection**), the annual snapshots of many of the reference tables associated with Balances, and the relevant monthly snapshots of Employee General and Job Class General (from the **Salary Management Data Collection**). For further information, see
http://provider.www.upenn.edu/computing/da/dw/research/proposals/eraspfy.html

- **PennERA Balances Universe -** provides access to current information about sponsored project proposals—*including fund adjustments*—and to General Ledger balances and associated reference tables. For users authorized to access both PennERA Proposals and General Ledger data in the Warehouse, this Universe enables reconciling PennERA data and General Ledger data for sponsored project funds. For further information, see
http://provider.www.upenn.edu/computing/da/dw/erabal/erabal.html

PennERA PROPOSALS DATA COLLECTION TIPS & TRICKS

- When developing a report for your ORG, be sure to select the data element that meets your needs.
  - For further information regarding ORGs for requests, periods, and proposals, see:
  http://provider.www.upenn.edu/computing/da/dw/research/proposals/pennera_request.t.html#ORGselection
  - For further information regarding ORGs for increments, periods, and proposals, see:
  http://provider.www.upenn.edu/computing/da/dw/research/proposals/pennera_increment.t.html#ORGselection
- Be careful about inadvertently inflating dollar amounts in reports.
  - When reporting on dollar amounts and investigators, list only one investigator, the PI. Reports on requests (or increments) may also safely list the request responsible investigator (or the account responsible investigator).
  - To avoid inflating dollar amounts, report them at only one level: proposal, period, request, or increment.

ADDITIONAL PennERA PROPOSALS DATA COLLECTION INFORMATION

- For Business Objects **Corporate Documents** involving PennERA Proposals data, see the Research / Proposals folder in Business Objects.
- For questions you should ask when developing a query accessing PennERA Proposals data, see
http://provider.www.upenn.edu/computing/da/dw/research/proposals/questions.html

FOR ADDITIONAL HELP WITH PennERA PROPOSALS DATA COLLECTION

- Send email to SPONPROJ-WH@LISTS.UPENN.EDU. This is a monitored listserv. Subscription is automatic for people who obtain access to the PennERA Proposals data collection.
- Send email to da-staff@isc.upenn.edu (Enterprise Information & Analytics staff).